

ASIAN BUSINESS FAMILY SURVEY: BEST PRACTICES IN RESPECTING PARTICIPANT PRIVACY AND INFORMATION SECURITY

Abacus Capital, INSEAD, Family Office Exchange and Wealth Strategist Network LLC (collectively known as “Research Partners”) respect the privacy of the families that have given us the privilege to study them as part of the Asian Business Family Survey (“Survey”). In this regard, Abacus Capital shall endeavor to respect the following information privacy and usage protocols:

Privacy

- Avoid reference to any particular family in any communication (including but not limited to research reports, electronic mail communication, presentations and verbal communication) that is shared with non-Research Partners involving data derived from the Survey, unless prior written permission has been obtained from the respective families.
- Ensure that authorized third parties involved in the research process will adhere to a confidentiality agreement in accordance with the points in this document.
- In any publication, findings will be reported in the aggregate by using statistical data (e.g. 23% of interviewed families have 30 or more family members) so no specific families can be directly identified from it. References to individuals or a single family will use pseudonyms in place of persons’ names and companies and care will be taken to ensure that the family cannot be identified directly or indirectly.
- The confidentiality rules expressed above do not apply to any information that is generally available to the public.

Information Security

- Store all Survey data under password-protected files.